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**ADMINISTRATIVE PROCEDURE 487**  
**DIRECTOR – FINANCIAL SERVICES**  
**ROLE AND RESPONSIBILITY STATEMENT**

**Background**

Guided by the Division's mission statement, vision statement, beliefs, and statement of values the Director – Financial Services will assist the Superintendent in fulfilling the general and specific aspects of the role description for the Superintendent as defined in provincial statute, Alberta Education Policy, and Board Policy

**Procedures**

The Director – Financial Services will report directly to the Assistant Superintendent – Business Services and will have specific responsibilities for:

1. Leadership Practices

- 1.1 The Director - Financial Services is viewed positively and has the support of those with whom he/she works most directly in carrying out his/her responsibilities.
- 1.2 Actively demonstrates and subscribes to the practice of leadership.
- 1.3 Works collaboratively with the Assistant Superintendent - Business Services.
- 1.4 Works to achieve goals approved by the CEO for the Department and the Division.
- 1.5 Monitors the achievement of the goals established for the Department and the Division that are related to the duties of this position.
- 1.6 Develops and implements a personal professional development plan for his/her ongoing professional improvement.
- 1.7 Works with the Superintendent to develop and implement strategies within the AEP/PERT planning process for enhancing student learning and building leadership capacity across the organization.
- 1.8 Works with the schools and departments to implement strategies for enhancing student learning.
- 1.9 As required, supports and advocates for implementing professional learning teams.

- 1.10 Provides supervision, evaluation, and supports to individuals reporting to this position.
2. Financial Services
  - 2.1 Achieves the goals established for the Department of Financial Services and the Division.
  - 2.2 Monitors the achievement of the goals established for the Department of Financial Services and the Division.
  - 2.3 Directs that corrective action be taken in the Department of Financial Services for goals that have not been achieved and monitors the corrective action.
  - 2.4 Provide guidance on fiscal management to Principals and department managers.
  - 2.5 Provide training to school-based and other department staff on accounting requirements and compliance with legislation, regulation, Division Policies and Administrative Procedures relating to the financial operations of the division.
3. Personnel Management
  - 3.1 Manages Department of Financial Services personnel.
  - 3.2 Deploys and supervises all Department of Financial Services staff and contractors.
  - 3.3 Plans for and implements Department of Financial Services in-service programs.
4. Fiscal Responsibility
  - 4.1 Plans, develops, monitors and directs the Department of Financial Services budget.
  - 4.2 Establishing and maintaining proper and adequate records of accounts, and for properly recording all financial affairs of the Division.
  - 4.3 Preparing budget estimates, the budget report, financial statements, reports, and other returns as may be required for the operation of the Division.
  - 4.4 Reconciliation and verification of Alberta Education Grant Revenues and the reconciliation of school allocations.
  - 4.5 Receiving all monies, overseeing cash management services, and for making all disbursements, including payroll, and ensuring that all receipts and disbursements are in accordance with legislation, by-laws, regulations, policy and budget provision.
  - 4.6 Advising or obtaining advice for the Assistant Superintendent - Business Services on the Division's financial affairs.

5. Policy

- 5.1 Provides leadership in the development of Board policies and administrative procedures, as assigned by the Assistant Superintendent – Business Services.

6. Other Duties and Obligations

- 6.1 Performs other duties and obligations as assigned by the Assistant Superintendent – Business Services.

Reference: Section 60, 61, 113, 116, 117 School Act

Developed: November 2005

Amended: June 4, 2008